



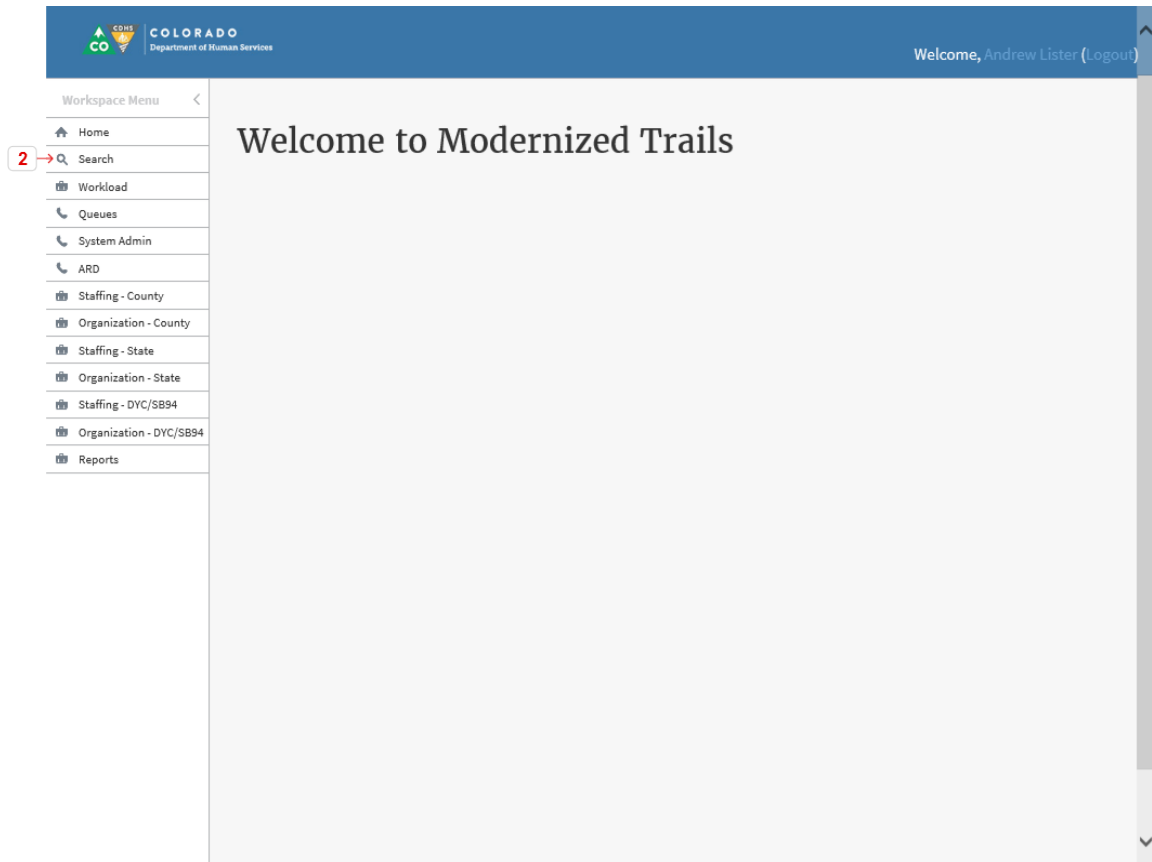
Purpose

This Job Aid provides you with a document that describes how to perform the task. You can print this document or save it to your local hard drive.

Procedure

1. Follow the steps below to complete the task:

Colorado Trails



2. Click the **Search** menu item.  Search



Colorado Trails

Workspace Menu <

- Home
- Search
- 3 → Client Search
- Public Provider Client Search
- Provider Search
- Hotline Search
- Workload
- Queues
- System Admin
- ARD
- Staffing - County
- Organization - County
- Staffing - State
- Organization - State
- Staffing - DYC/SB94
- Organization - DYC/SB94
- Reports

Welcome to Modernized Trails

Welcome, Andrew Lister (Logout)

3. Click the **Client Search** menu item. [Client Search](#)



Client Search - Colorado Trails

CDHS COLORADO Department of Human Services Welcome, Andrew Lister (Logout)


Client Search

Search Queries

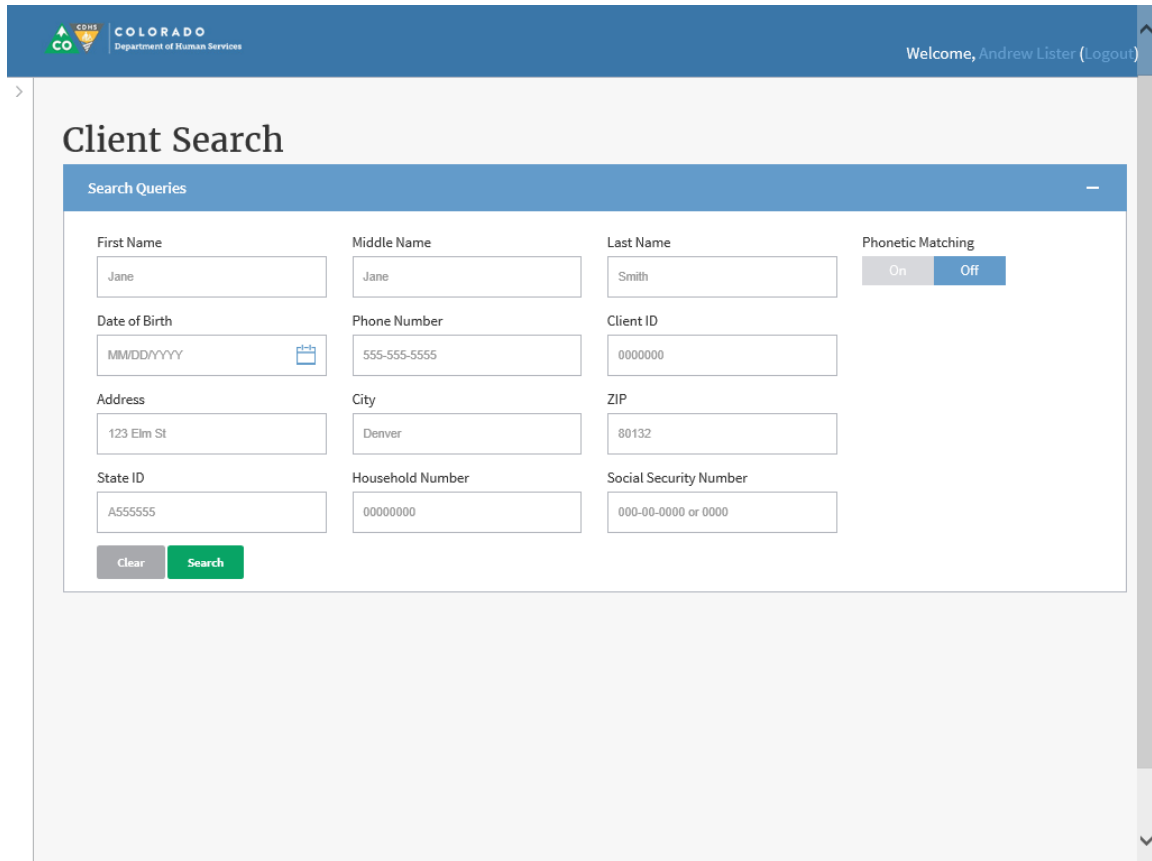
First Name Jane	Middle Name Jane	Last Name Smith	Phonetic Matching On Off
Date of Birth MM/DD/YYYY	Phone Number 555-555-5555	Client ID 0000000	
Address 123 Elm St	City Denver	ZIP 80132	
State ID A555555	Household Number 00000000	Social Security Number 000-00-0000 or 0000	

Clear Search

4. Client Search

 The Client Search page displays.

Client Search - Colorado Trails




Client Search

Search Queries

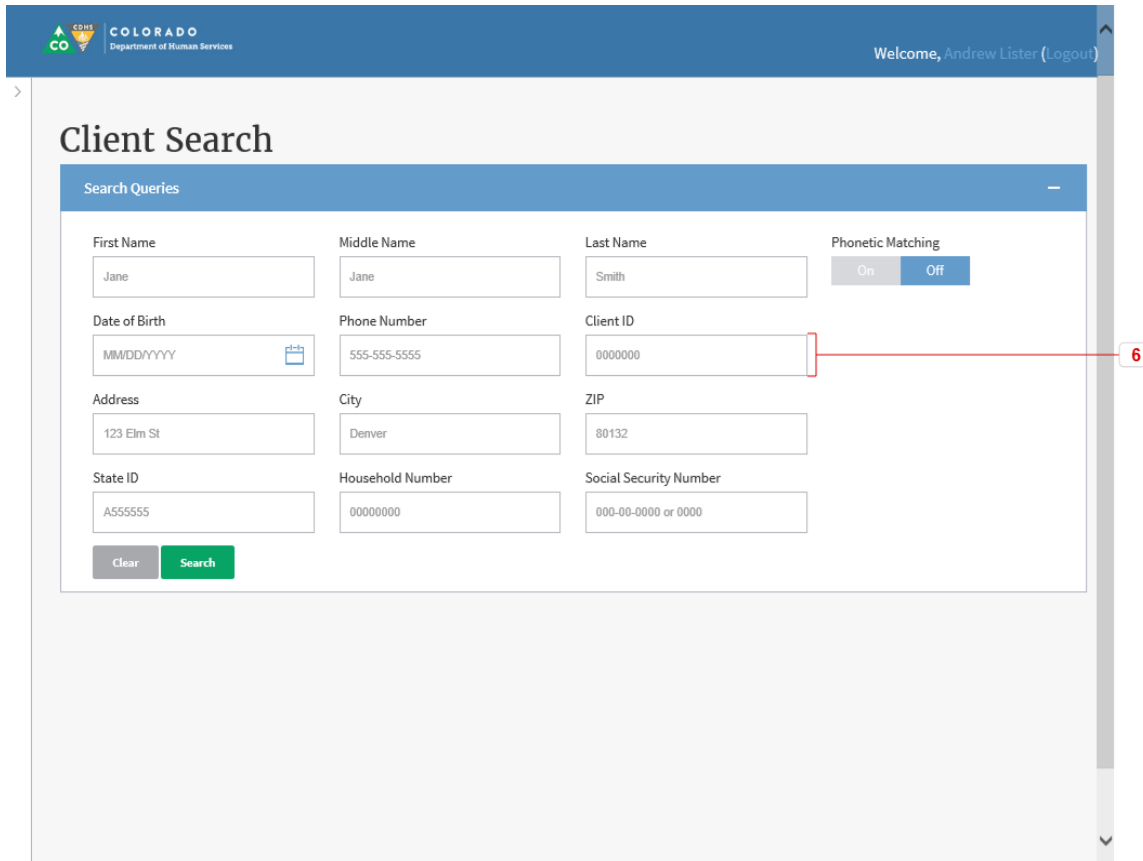
First Name Jane	Middle Name Jane	Last Name Smith	Phonetic Matching On Off
Date of Birth MM/DD/YYYY	Phone Number 555-555-5555	Client ID 0000000	
Address 123 Elm St	City Denver	ZIP 80132	
State ID A555555	Household Number 00000000	Social Security Number 000-00-0000 or 0000	

Clear Search

5. Client Search Queries

 Use the Client Search page to search for a client and view the assigned staff. For example, you could search using a Client ID.

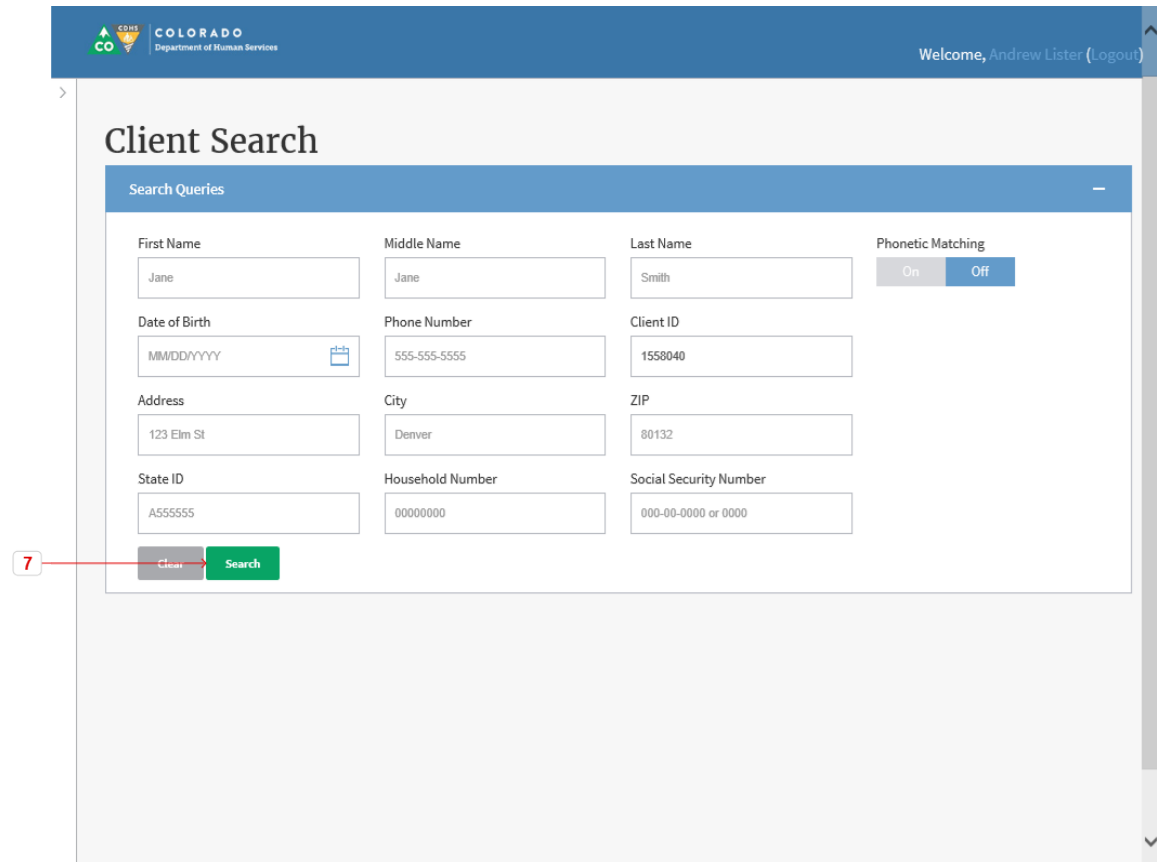
Client Search - Colorado Trails



6. As required, complete/review the following fields:

Field	R/O/C	Description
Client ID	R	Example: 1558040

Client Search - Colorado Trails



7. Click the **Search** button.





Client Search - Colorado Trails

CDHS COLORADO Department of Human Services

Welcome, Andrew Lister (Logout)

Client Search

Search Queries +

Showing results x of y

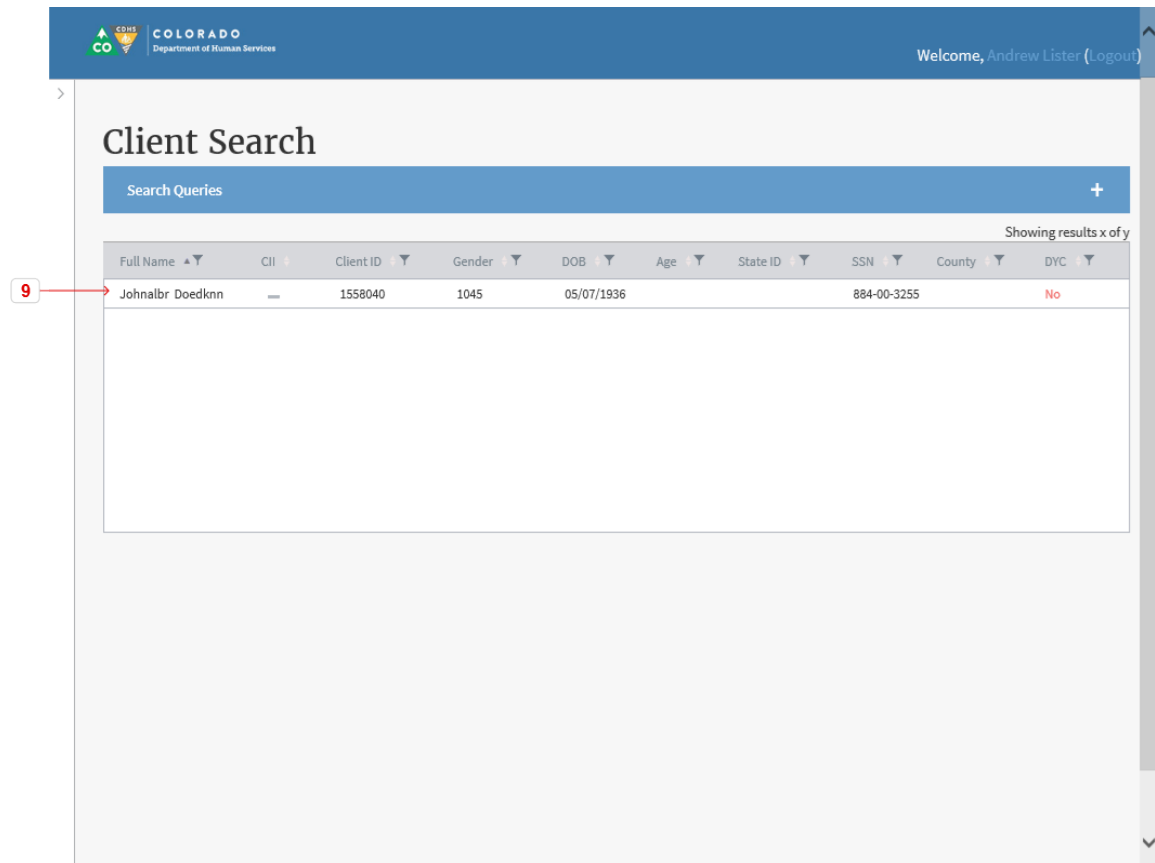
Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYC
Johnalbr Doedknn	—	1558040	1045	05/07/1936			884-00-3255		No

8. Client Search Results



The client that matches your search criteria displays in the table.

Client Search - Colorado Trails



The screenshot displays the 'Client Search' interface. At the top, there is a blue header with the Colorado Department of Human Services logo and the text 'Welcome, Andrew Lister (Logout)'. Below the header, the main content area is titled 'Client Search'. A search bar labeled 'Search Queries' is visible. Below the search bar, a table displays search results. The table has the following columns: Full Name, CII, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYC. The first row of data shows: Johnalbr Doedknn, -, 1558040, 1045, 05/07/1936, 884-00-3255, and No. A red circle with the number '9' is positioned to the left of the 'Full Name' column, with a red arrow pointing to the text 'Johnalbr Doedknn'.

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYC
Johnalbr Doedknn	-	1558040	1045	05/07/1936			884-00-3255		No

9. Click the **Full Name** link. Johnalbr Doedknn



Client Search - Colorado Trails

CDHS COLORADO Department of Human Services

Welcome, Andrew Lister (Logout)

Johnalbr Doedknn 1558040 1045 05/07/1936 884-00-3255


General Relations² Addresses² Phone² CW Referral/Assessment¹ Critical Info⁰

JOHNALBR DOEDKNN

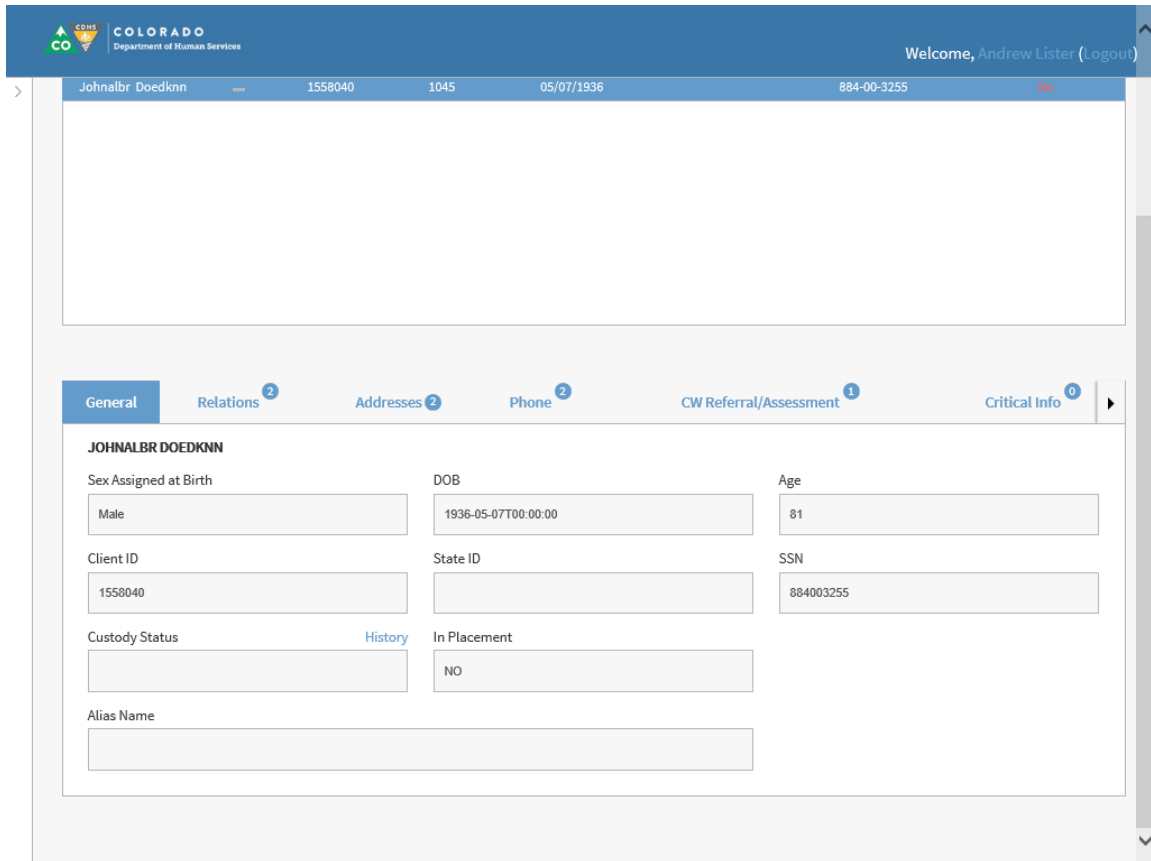
Sex Assigned at Birth	DOB	Age
Male	1936-05-07T00:00:00	81
Client ID	State ID	SSN
1558040		884003255
Custody Status	In Placement	
	NO	
Alias Name		

10. General Tab



 Client details will display in tabs below the search results table, with the General tab displaying by default.

Client Search - Colorado Trails



The screenshot shows the Colorado Trails interface. At the top, there is a header with the Colorado Department of Human Services logo and the text "Welcome, Andrew Lister (Logout)". Below the header is a search results table with one entry for "Johnalbr Doedknn" with ID 1558040, State ID 1045, and DOB 05/07/1936. Below the table is a tabbed interface with the following tabs: "General" (selected), "Relations" (2), "Addresses" (2), "Phone" (2), "CW Referral/Assessment" (1), and "Critical Info" (0). The "General" tab displays the following client information:

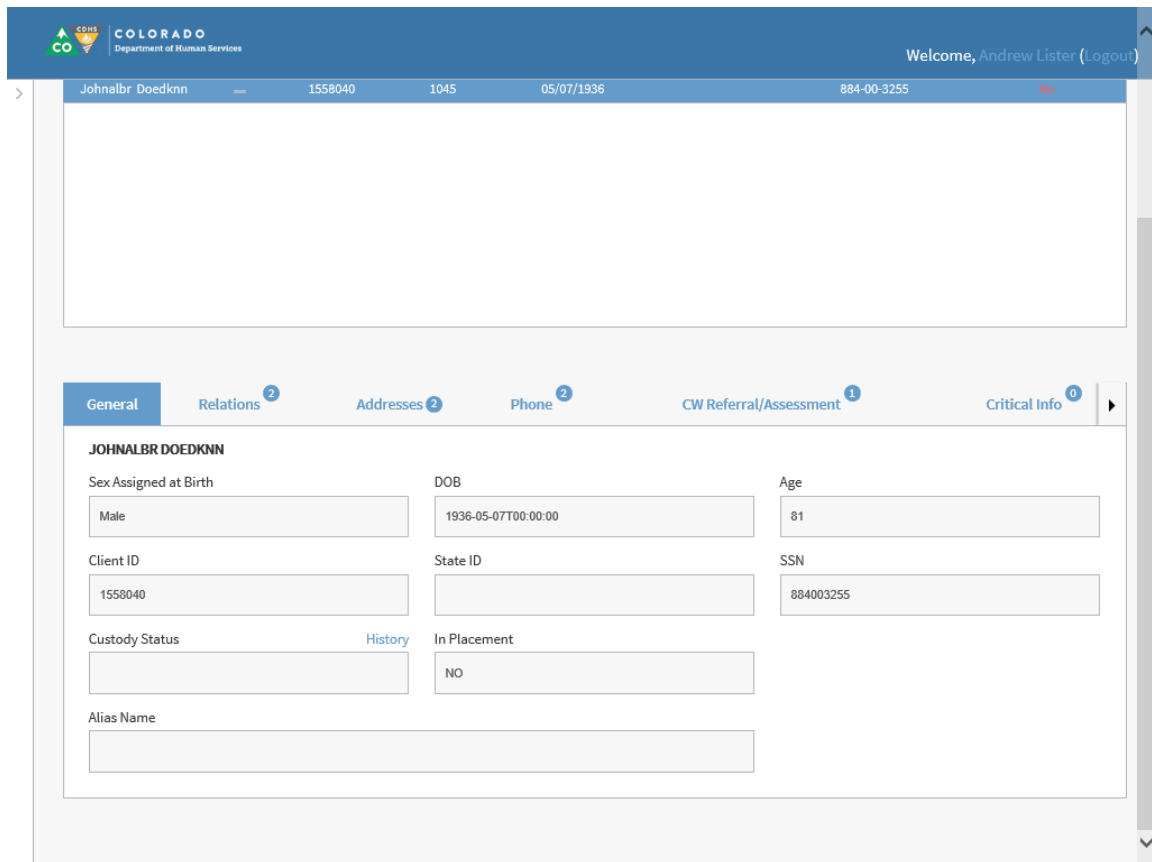
JOHNALBR DOEDKNN		
Sex Assigned at Birth	DOB	Age
Male	1936-05-07T00:00:00	81
Client ID	State ID	SSN
1558040		884003255
Custody Status History	In Placement	
	NO	
Alias Name		

11. Client Details Tabs



Select a tab to view specific client information. You may need to scroll across the tabs to find the details you are looking for, as you will for this task and the client's assigned staff details.

Client Search - Colorado Trails



The screenshot shows the Colorado Trails client search interface. At the top, there is a header with the Colorado Department of Human Services logo and the text "WELCOME, Andrew Lister (Logout)". Below the header, a client profile card is displayed for "Johnalbr Doedknn" with the following details: 1558040, 1045, 05/07/1936, and 884-00-3255. Below the client profile card, there are several tabs: "General", "Relations", "Addresses", "Phone", "CW Referral/Assessment", and "Critical Info". The "General" tab is selected, and the client's information is displayed in a form. The form includes fields for Sex Assigned at Birth (Male), Client ID (1558040), Custody Status, Alias Name, DOB (1936-05-07T00:00:00), State ID, In Placement (NO), and Age (81). There is also a "History" link next to the Custody Status field.

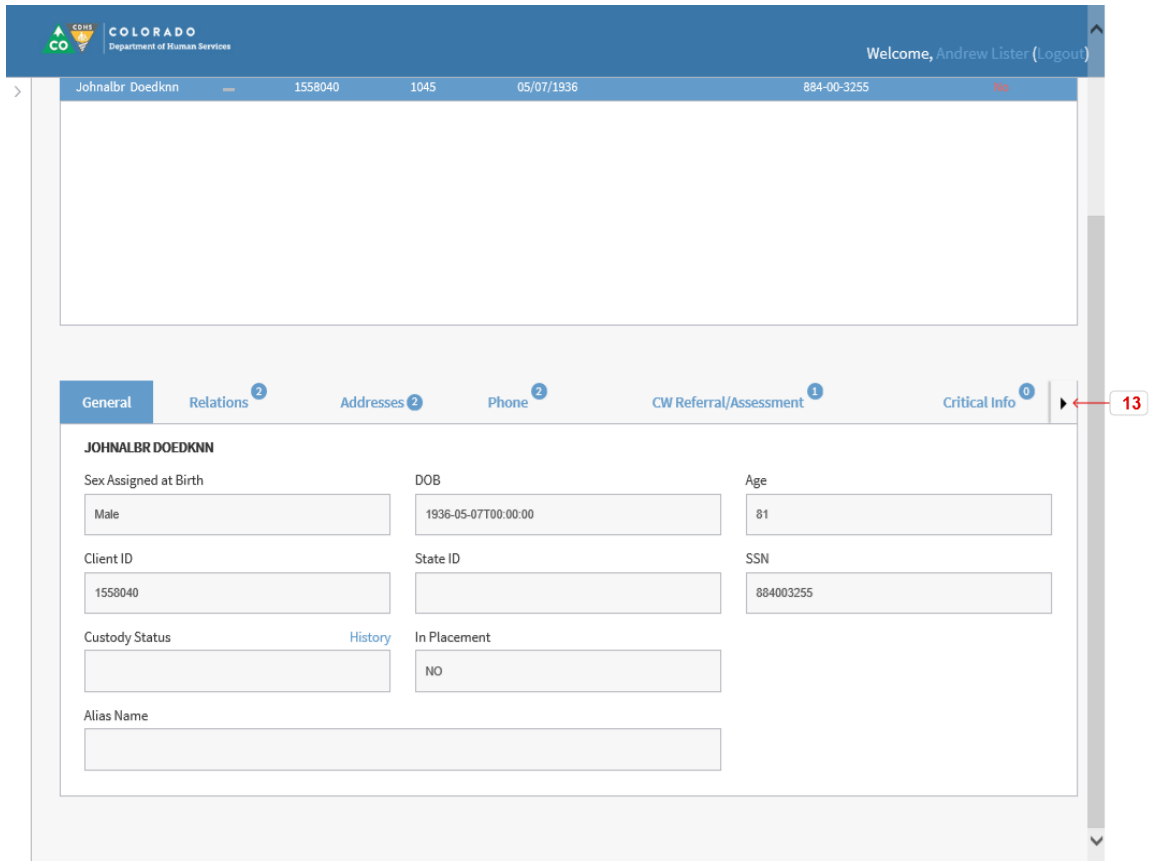
JOHNALBR DOEDKNN		
Sex Assigned at Birth	DOB	Age
Male	1936-05-07T00:00:00	81
Client ID	State ID	SSN
1558040		884003255
Custody Status	In Placement	
	NO	
Alias Name		

12. Additional tabs are available



To view additional client information use the scroll arrow to display additional tabs.

Client Search - Colorado Trails



Colorado Department of Human Services

Welcome, Andrew Lister (Logout)

Johnalbr Doedknn 1558040 1045 05/07/1936 884-00-3255

General Relations² Addresses² Phone² CW Referral/Assessment¹ Critical Info¹

JOHNALBR DOEDKNN

Sex Assigned at Birth: Male DOB: 1936-05-07T00:00:00 Age: 81

Client ID: 1558040 State ID: State ID SSN: 884003255

Custody Status: History In Placement: NO

Alias Name:

13. Click the **Scroll Arrow**. 



Client Search - Colorado Trails

CDHS COLORADO Department of Human Services

Welcome, Andrew Lister (Logout)

Search Queries +

1 result

Full Name	CIL	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnalbr Doedknn	—	1558040	Male	05/07/1936	81		884-00-3255		No

Assigned Staff 4 | Associated Providers 0 | Critical Incident Reports 0 | SB94 Cases 0 | Admissions 0 | TIC 0 | Cases 5 | Prevention Cases 0 | Placements 0


Staff Name	Trails ID	Date Open	Role
JOHNXVCT DOERIGF	16037	06/22/2006	Primary
JOHNRDDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
rive, sue	100000118	04/08/2002	Primary

14. Additional Tabs Display



The additional tabs display and the Assigned Staff tab we need to review is selected.

Client Search - Colorado Trails


Welcome, Andrew Lister (Logout)

Search Queries +

1 result

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnalbr Doedknn	—	1558040	Male	05/07/1936	81		884-00-3255		No

Assigned Staff 4

Associated Providers 0

Critical Incident Reports 0

SB94 Cases 0

Admissions 0

TIC 0


Cases 5

Prevention Cases 0


Placements 0

Staff Name	Trails ID	Date Open	Role
JOHNXVCT DOERIGF	16037	06/22/2006	Primary
JOHNRDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
rive, sue	100000118	04/08/2002	Primary

15. Assigned Staff Tab

 The Assigned Staff tab will display a list of associated open/active staff (primary and secondary) in CW and DYS, that are currently assigned to the client (through referrals and providers).

Client Search - Colorado Trails



COLORADO
Department of Human Services

Welcome, Andrew Lister (Logout)

Search Queries +

1 result									
Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnalbr Doedknn	—	1558040	Male	05/07/1936	81		884-00-3255		No

Assigned Staff 4
Associated Providers 0
Critical Incident Reports 0
SB94 Cases 0
Admissions 0
TIC 0
Cases 5
Prevention Cases 0
Placements 0

Staff Name	Trails ID	Date Open	Role
JOHNXVCT DOERIGF	16037	06/22/2006	Primary
JOHNRDDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
rive, sue	100000118	04/08/2002	Primary

16. Number of Assigned Staff



Notice the number of assigned staff in the list displays on the tab, in this example the number of workers is 4.

Client Search - Colorado Trails


The screenshot shows the Colorado Trails client search interface. At the top, there is a search bar labeled "Search Queries" with a plus sign. Below the search bar, a table displays search results. The table has columns for Full Name, CIL, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYS. One result is shown for Johnalbr Doedknn with Client ID 1558040, Male, DOB 05/07/1936, Age 81, State ID 884-00-3255, and DYS No.

Below the search results, there is a navigation bar with several tabs: "Assigned Staff 4", "Associated Providers 0", "Critical Incident Reports 0", "SB94 Cases 0", "Admissions 0", "TIC 0", "Cases 5", "Prevention Cases 0", and "Placements 0". The "Assigned Staff" tab is selected.

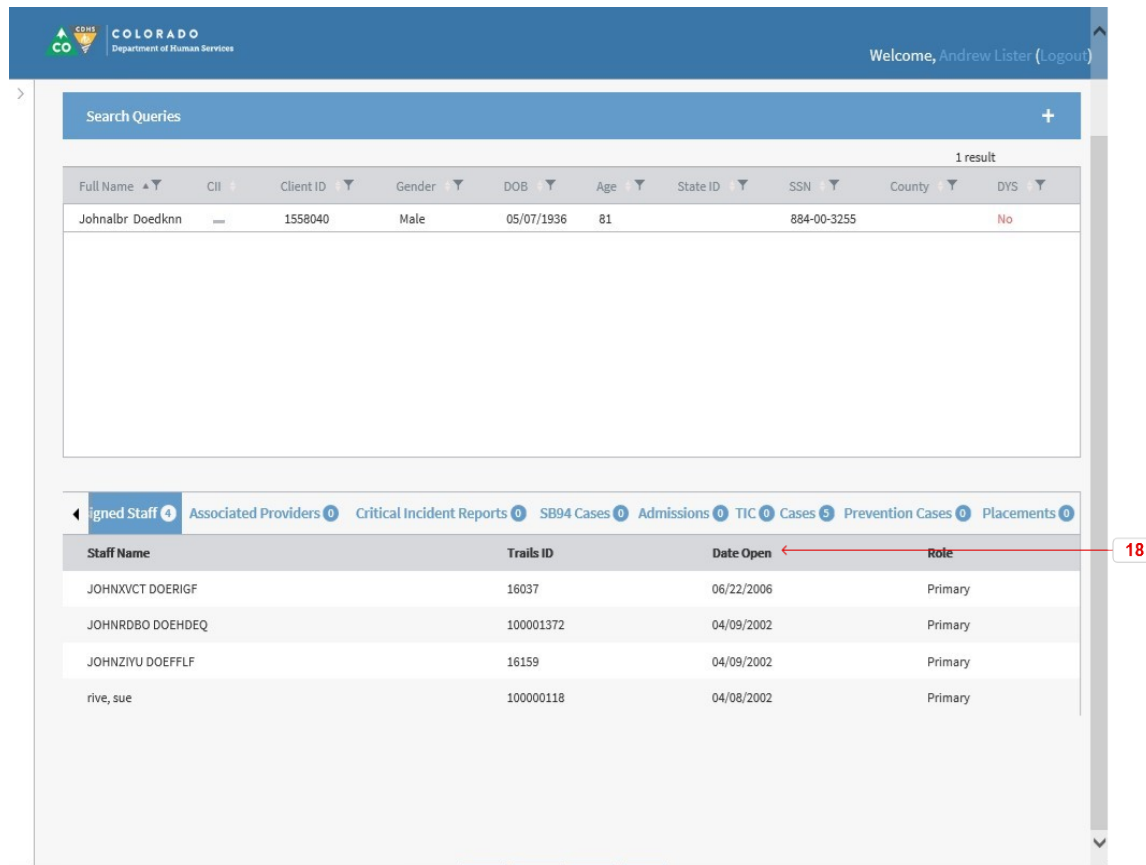
The "Assigned Staff" tab displays a table with the following data:

Staff Name	Trails ID	Date Open	Role
JOHNXVCT DOERIGF	16037	06/22/2006	Primary
JOHNRDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
rive, sue	100000118	04/08/2002	Primary

17. Assigned Staff Tab Default Sort

 Primary workers with the most recent date open will appear at the top of the list by default. You can easily re-sort the information in the table by clicking on a column header; for example, you might want to see the oldest open date first in the list.

Client Search - Colorado Trails



The screenshot shows the Colorado Trails system interface. At the top, there is a navigation bar with the Colorado Department of Human Services logo and the text "Welcome, Andrew Lister (Logout)". Below this is a "Search Queries" section with a search bar and a "+" icon. The search results are displayed in a table with the following columns: Full Name, CII, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYS. A single result is shown for "Johnalbr Doedknn" with Client ID 1558040, Gender Male, DOB 05/07/1936, Age 81, State ID 884-00-3255, and DYS No.

Below the search results is a navigation bar with several tabs: "Signed Staff", "Associated Providers", "Critical Incident Reports", "SB94 Cases", "Admissions", "TIC", "Cases", "Prevention Cases", and "Placements". The "Signed Staff" tab is selected, and a table of staff is displayed with the following columns: Staff Name, Trails ID, Date Open, and Role. A red arrow points to the "Date Open" column header, which is highlighted in a grey box. A red box with the number "18" is positioned to the right of the arrow.

Staff Name	Trails ID	Date Open	Role
JOHNXYCT DOERIGF	16037	06/22/2006	Primary
JOHNRDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNZYU DOEFFLF	16159	04/09/2002	Primary
rive, sue	100000118	04/08/2002	Primary

18. Click the **Date Open** column header. **Date Open**



Client Search - Colorado Trails

CDHS COLORADO Department of Human Services

Welcome, Andrew Lister (Logout)

Search Queries +


Showing results x of y

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYC
Johnalbr Doedknn	—	1558040	1045	05/07/1936			884-00-3255		No

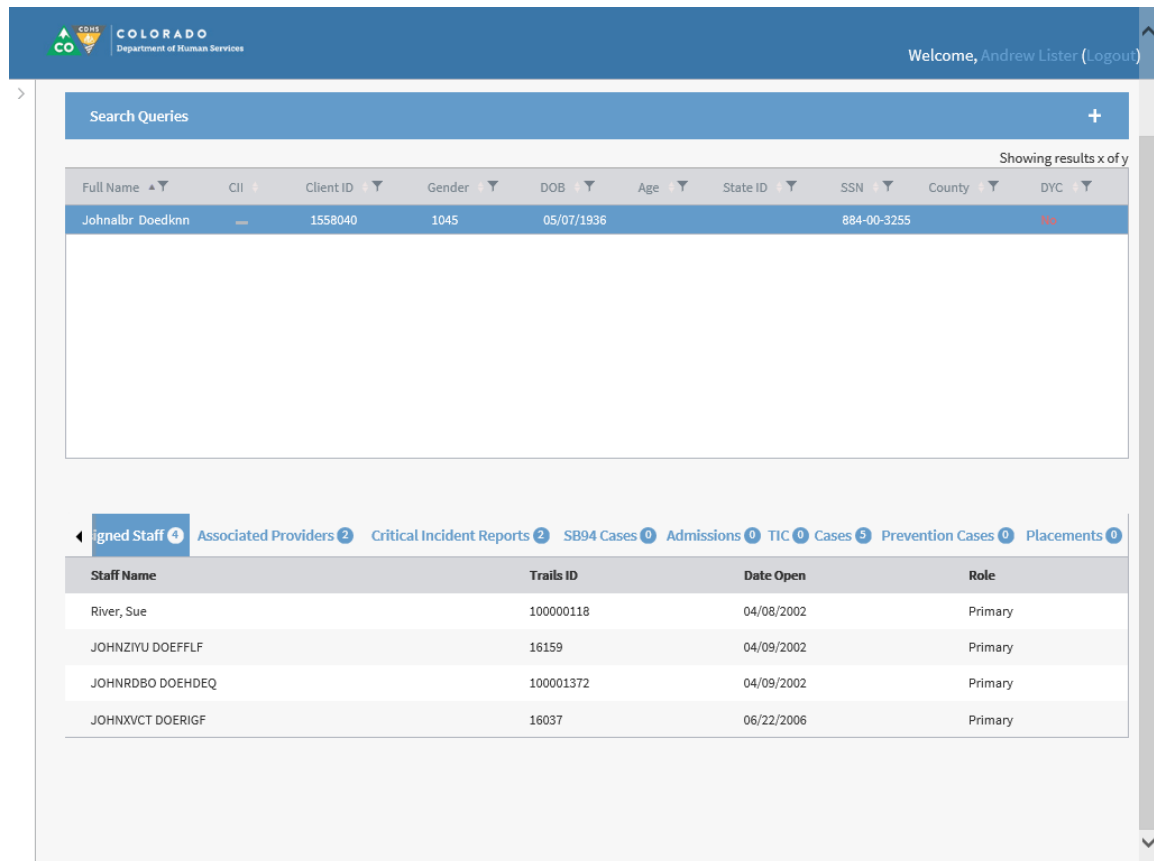
Assigned Staff 4 | Associated Providers 2 | Critical Incident Reports 2 | SB94 Cases 0 | Admissions 0 | TIC 0 | Cases 5 | Prevention Cases 0 | Placements 0

Staff Name	Trails ID	Date Open	Role
River, Sue	100000118	04/08/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
JOHNRDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNVCT DOERIGF	16037	06/22/2006	Primary

19. Assigned Staff Sorted

 The list of assigned staff now displays with the oldest open date displayed at the top of the list.

Client Search - Colorado Trails




The screenshot shows the 'Client Search - Colorado Trails' interface. At the top, there is a search bar and a 'Search Queries' button. Below this, a table displays search results for a client named 'Johnalbr Doedknn'. The table has columns for Full Name, CII, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYC. The client's details are: Full Name: Johnalbr Doedknn, CII: —, Client ID: 1558040, Gender: 1045, DOB: 05/07/1936, Age: 884-00-3255, County: No.

Below the search results, there is a navigation bar with tabs for 'Assigned Staff', 'Associated Providers', 'Critical Incident Reports', 'SB94 Cases', 'Admissions', 'TIC', 'Cases', 'Prevention Cases', and 'Placements'. The 'Assigned Staff' tab is selected, showing a list of staff members with columns for Staff Name, Trails ID, Date Open, and Role.

Staff Name	Trails ID	Date Open	Role
River, Sue	100000118	04/08/2002	Primary
JOHNZIYU DOEFFLF	16159	04/09/2002	Primary
JOHNRDDBO DOEHDEQ	100001372	04/09/2002	Primary
JOHNXVCT DOERIGF	16037	06/22/2006	Primary

20. Process Complete

 Once you have reviewed the selected client's associated staff, you can review further information or move on to another task.